

Educational Aide Exemption Program Frequently Asked Questions and Answers

1. Can a student use the exemption for remedial or developmental courses?

Yes

2. What fees are covered by the exemption?

All fees that are considered mandatory by the institution are covered, with the exception of class and laboratory fees. There is not a set definition of class fees. Each institution will have to make its own interpretation.

3. Does the student have to file a FAFSA?

Please check with your institution to find out whether or not the FAFSA is required. The FAFSA is for their benefit, because it can be used to help a student prove eligibility for other aid as well as for this exemption. Financial need **is** a criterion and has to be determined by the institution. If the student is not to receive any other aid, institutions may determine the student's financial need by using his or her adjusted gross income (see the Coordinating Board rules). The institution will determine whether or not the AGI method will be accepted.

4. Is a student who has defaulted on a loan eligible to receive this exemption?

Yes, as long as he or she is in good academic standing according to the Financial Aid Office. The student will need to be able to demonstrate financial need based on the Adjusted Gross Income (AGI) method. The institution will determine whether or not the AGI method will be accepted.

5. If students are receiving student loans, do the loans reduce their need for the exemption?

No. The Coordinating Board rules indicate need is to be determined by subtracting family contribution and gift aid from the cost of attendance. To avoid an over award, you would note the amount the student is entitled to under the recommended award slot on the application. When a student's eligibility is determined for a loan, however, the exemption would be considered either as an adjustment to the cost of attendance or as a type of gift aid.

6. How does an institution determine if a student is taking classes leading to teacher certification?

If the student is attending a junior college, there should be a clear understanding that he or she is going to enroll in a university to get his/her teacher certification. If enrolled in lower-level coursework, the student should sign a statement indicating an intention to become certified as a teacher and teach in Texas.

7. Are students who possess a Bachelor's degree eligible for the exemption if all other requirements are met?

Yes. The student can receive the exemption, as long as the student is pursuing a teacher certificate and is otherwise eligible; it does not matter if he or she already has a bachelor's degree. An individual who receives a Bachelor's degree prior to receiving his or her first award is **not** eligible for an exemption from student teaching.

8. Are exemption recipients who receive a Bachelor's while receiving an award through this program eligible for a student teaching exemption?

Yes. The student shall not be required by his or her institution to participate in any field experience or internship consisting of student teaching as a requirement to receive a teaching certificate.

9. Does a university/college automatically award the exemptions or do the applicants have to be approved by the Coordinating Board first?

An award is not complete until the Board has certified the student's eligibility. If the institution feels comfortable, however, they can go ahead and grant the exemption on the basis of the eligibility criteria. If the institution does not feel comfortable certifying student eligibility, they should wait for our letter.

10. When should an institution award the exemption?

The exemption should be awarded as soon as the institution is notified by the Board that the student is eligible. If the student has already paid for his or her tuition and relevant fees before the college receives the letter, the institution needs to send the Board a Reimbursement Request, and the student will be refunded. If the institution exempted the student automatically, a Reimbursement Request will still need to be submitted to the Board. The Financial Aid Office of each institution will need to notify their Business Office of the amount each student is to be exempted through this program. **Keep in mind that the maximum amount an eligible student can receive is his/her financial need or tuition and relevant fees, whichever is less.**

11. What are the procedures for requesting a reimbursement?

Once an award letter has been received and the institution knows how much is to be reimbursed (which is usually after the term's census date), an institution must submit a Reimbursement Request Form to the Coordinating Board. **DO NOT SEND A REIMBURSEMENT REQUEST FOR A STUDENT IF YOU HAVE NOT RECEIVED AN AWARD LETTER FOR HIM/HER.** The Board will then request the funds. Requests are only processed on the 1st and 15th of each month. It takes approximately 2-3 weeks for the Board to receive the funds after they have been requested. When the funds are received, the Board will Electronically Transfer Funds (EFT) to the institution. The Reporting Officer will receive an EFT email notification which includes the list of students and dollar amounts to be disbursed to each.

12. Will all students who apply be exempted?

To date we have enough money to fund all who apply and meet all the criteria. If there are any changes to this, institutions will be notified.

13. Who is able to sign Part II of the application?

Anyone who is authorized to sign personnel actions may verify the applicant's current and previous employment, including Principals, Personnel Directors and Superintendents in the school district, but not secretaries or teachers. The person who signs Part II is certifying that he or she verifies the aide's required year of employment or the substitute teacher's 180 days of employment.

14. Are Institutions supposed to be the “police officer” for this program, in verifying the aide’s employment?

No. The person who signs Part II of the application is verifying that the aide/substitute teacher will be or has been employed and we will take their word for it. If the institution finds out that the aide/substitute teacher is not to be employed or has not been employed, then the institution can notify us and we will follow up with the school district.

15. Is there a certain number of hours an aide must be enrolled or employed in?

No. There is nothing in law that indicates the number of hours in which an aide must be enrolled or his or her level of employment, but the aide **must** be employed while receiving the exemption and must be enrolled in classes leading to teacher certification. Please keep in mind that the institution may have guidelines regarding the number of enrollment hours, therefore those requirements will have to be met.

16. Explain the term “aide”.

An Educational Aide is a person who is employed by a public school district in Texas working in the classroom directly with students.

17. How does an institution determine a student’s recommended award if they use the Adjusted Gross Income method?

The recommended award would be the student’s tuition and mandatory fees (other than class or laboratory fees), which is also the amount the student will be receiving through this exemption only. Keep in mind that this is just an estimated amount and the actual amount will be reported when the institution sends us a Reimbursement Request Form.

18. Is the Building Use Fee which is now considered Tuition at universities, covered under this exemption?

Yes. The Building Use Fee has been re-designated as tuition and is covered.

19. When does the one year of experience need to be completed?

The educational aide must have one school year of full-time educational aide experience during the five years preceding the term or semester for which the student is awarded his or her initial exemption. The one year of experience is one school year, so summer is not included.

20. What if a student receives the exemption, but is later found ineligible?

The college would have a 10-day window from the time they became aware of their error to make good on the tuition payment. It would be similar to a student paying by check, but the check not clearing the bank. If the charge is covered in the 10-day period, no further action is needed.

21. Will the institutions be notified if a student is eligible to receive the exemption in the Spring term?

Each November, the Coordinating Board will send the school districts a roster asking them to verify the aides/substitute teacher’s employment for the spring term. Once the Board receives the roster back from the school districts, spring letters are processed and mailed out. A spring award letter is not sent out unless the roster is received. If the student does not receive the letter before payment is due, he or she will need to pay up front and then will be refunded later. In order to avoid paying up front, the student may want to notify their school district that the rosters were mailed in November and they can fax the verifications to the Board.

22. Will a student be able to utilize this exemption if he or she enrolls for a mini session?

Mini sessions can be awarded, but will need to be based on the fall or spring letter. For example, if a student is enrolled over the Christmas holiday, the award would be based on the Fall certification. If the student is enrolled over Spring Break, the award would be based on the Spring certification.

23. What happens if a student drops hours or withdraws after an institution has submitted the request for reimbursement and payment has been received?

The institution will use their internal billing policies.

24. What if a student applies for the exemption and shows no need?

If a student shows no need though either the FAFSA or their Adjusted Gross Income, he or she is not eligible to participate in the program. The application can still be submitted for statistical purposes. We need to be able to report how many aides are being turned away because of the need criterion. When submitting the "no need" application, simply write on the slot asking for financial need "Need equals 0, not eligible based on FAFSA or AGI".

25. What if a student is co-enrolled, can they receive the exemption at both institutions?

Yes. A separate application must be submitted for each college.

26. If a student did not make satisfactory academic progress in the fall, but does in the spring, is he or she eligible for the spring term?

No. A requirement for a student to be eligible for the spring term is that he or she must have made satisfactory academic progress in the fall according to the financial aid office. If the student brings up his or her performance in the spring, he or she may receive an exemption in the following semester.

27. Does a student need to apply every semester or every year?

A student needs to apply every year. There are separate applications for fall/spring and for summer. A separate application is required for the summer term since it is only funded upon the availability of funds. Spring awards are made once we receive the roster back from the school district verifying the certified aide's/substitute teacher's spring employment.

28. Which institutions are eligible to participate?

The only institutions eligible to participate are public institutions of higher education in Texas.

29. If a student is taking an extension class, is he or she able to participate in the program?

In general, courses that are covered by this exemption are those that are offered for credit, are a part of the student's preparation for becoming a teacher and are offered by public institutions of higher education. Courses for which the institution does not receive formula funding are not eligible.

30. Are correspondence courses covered by this exemption?

Only if the correspondence course is one for which the school receives formula funding from the state; the course is a part of the student's curriculum for becoming a teacher; and the college can derive a valid financial need calculation for the student.

31. Is there a deadline to submit the application for an Educational Aide Exemption?

Completed applications must be submitted to the Coordinating Board by the deadline date. Summer 2009 must be submitted by July 1, 2009. Fall 2009 must be submitted by February 1, 2010. Spring 2009 must be submitted by July 1, 2010.

32. Which Income Tax Form must be used?

If the student is qualifying based on their adjusted gross income, their most recent income tax form must be used. If the student is qualifying based on their FAFSA, then the institution would use the FAFSA that pertains to the academic year the student is qualifying for. If the student's current tax return has not yet been processed, a preliminary award can be made based on his/her prior year tax return, but the new return must be submitted to the Coordinating Board as verification as soon as it is completed.

33. Can substitute teachers participate?

Yes, if the substitute teacher has acquired one school year of full-time educational aide experience during the 5 years prior to receiving his/her first exemption. If the substitute teacher has not acquired one school year of full-time educational aide experience during the prior five years, then the applicant must provide documentation of at least 180 full days of service as a substitute teacher during that time. The school district will need to keep documentation on file. The applicant must meet all other eligibility requirements.

34. High School Juniors and Seniors have the opportunity to participate in a Business/Co-op program in which they are employed with the school. Can this count towards the one year of educational aide experience for the educational aide program?

No. Since the students do not have their High School degrees, they do not meet the general requirements ISD's require for aides.

35. Can school bus drivers participate?

Yes. If the school bus driver has acquired one school year of educational aide experience within the past 5 years, then a school bus driver falls under a school employee serving in any capacity. The applicant must meet all of the eligibility requirements.

36. Can a volunteer at the school district participate?

No. The applicant must be employed with a school or school district. This means the school district is **paying** the applicant a salary.

37. I work at the school district, but I'm not being paid by the school district, can I participate?

No. The school district has to **employ** and **pay** the applicant a salary.

38. I want to enroll in the Alternative Certification Program, can I participate?

If the institution you plan to attend receives formula funding (tax support) for the hours in which you will enroll, then yes, you may participate. All of the eligibility requirements must be met.

39. Can I enroll at a private institution?

No. The exemption is for eligible Texas public community colleges and Texas public universities only.

40. I want to quit my job while I'm in school, can I participate?

One of the eligibility requirements is that the individual must be employed by a Texas public school district during the full term in which he/she receives the exemption unless granted a hardship waiver.

41. What is a hardship waiver?

A hardship waiver can be granted if the student was employed at the beginning of the relevant term, but was unable to remain employed throughout the term for reasons beyond his/her control. Such situations include, but are not limited to, the following:

- (1) a severe illness or other debilitating condition that may affect the individual's ability to continue employment,
- (2) responsibility for the care of a temporarily disabled dependent that may affect the recipient's ability to continue employment, or
- (3) performance of active duty military service.

42. What does employed with a Texas public school district mean?

The school district has to **employ** and **pay** the applicant a salary.

43. Can the institution submit the request for reimbursement the same time as the application?

Only if the student has already paid tuition and fees and documentation of charges is also submitted. Once the application has been reviewed and the student is approved, we will electronically transfer funds to the institution.

44. If I obtain one school year of full-time educational experience outside the State of Texas, can I use this educational experience to apply for the exemption?

No. A person has to be employed by a public school district in Texas in a teaching capacity working in the classroom directly with students for at least one year on a full-time basis.

45. Does the exemption consider substitute teachers who are on the substitute teacher list employed?

Yes. Please keep in mind, **the substitute teacher must accept assignments during the term in which they receive the exemption.** If the substitute teacher does not accept any assignments during the term in which they receive the exemption, then the eligibility requirement of being employed is not being fulfilled. The exemption will be denied for that specific term and any funds paid to the institution will have to be returned by the institution.

46. I am employed with a Texas public school district, but I am not physically working; can I receive the exemption?

A student must be a **paid** employee and receiving a **salary** and **benefits** in order to be eligible for the Educational Aide Exemption.